

Planning a Workshop?



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by George Hollich

Workshops provide excellent opportunities for sharing ideas, networking, and planning. If you are the planner, there are two essential tasks before you start planning the workshop: 1) Allow **plenty of time** to do a good job; and 2) **get help!** You could ask people to help or you can form a workshop committee. Also, check to see if there are others who have done this before who may have lists that would help in planning the event. Whatever option you choose, this brief guide will help in planning your workshop.

First Steps

Allow Plenty of Time

The most common mistake in planning a conference or workshop is not allowing enough time to get done what has to be done. Many successful larger events begin over a year in advance of the actual program. For a single workshop event, 6 months is ideal, but certainly do not attempt to prepare a workshop event with less than 4 months of lead-time.

Checkpoint:

- I have less than 4 months. **STOP** and rethink the date... or wait until next year!*
- I have over 4 months. **CONTINUE***

Form a committee

Planning a workshop requires considerable effort, and it helps if there are other people to share the load. It may be helpful to form two groups: a committee to do the actual organizing and running of the workshop, and a reference group who can advise on different aspects of its preparation. Members of the reference group may be people who have previously been involved in running the workshop, or who would like to be involved in the workshop organization, but are unable to because of other commitments. So your first assignment is to form a committee and hold a meeting.

Checkpoint:

- I don't have any help. **STOP** and rethink.*
- I have help. **CONTINUE***
- I have not announced a committee meeting date. **STOP** and do so quickly.*
- I have announced a time for a committee meeting. **CONTINUE***

4-6 months before the event

First committee meeting...

In many ways your first committee meeting is the most important. It will be at this time that you should agree upon the purpose of the workshop, set the timeline, agree upon tasks, and delegate responsibility for tasks. The following is an agenda of things you will want to include in the planning for your first meeting...

- introduce committee members to each other
- brief everyone on the task at hand
- identify the purpose of the workshop – Basic or Advanced
- discuss the title and theme for the workshop
- develop a list preferred presenters (Clergy, Community Based, Their expertise)
- estimate your budget
- if not already selected, establish the date or range of dates & time (Decide dates that will not work. Decide days of the week you are prepared to consider. Time of day morning, afternoon, evening, overnight? Midweek? Weekend? Multiple sessions?)
- review or create a time line for planning the workshop (dates for committee meetings, selection of a site and curriculum, drop-dead dates for securing the location and presenter)
- target minimum and maximum numbers of attendees
- brainstorm & list possible places to hold the event (Church, Theatre, Hotel, School)

Checkpoint:

- We have not addressed all of the above items. **STOP** and complete all items.
- We have discussed all of the above items. **CONTINUE** the meeting by creating a list of tasks which must be completed

Creating a task list...

Tasks for a workshop vary from one event to another. You will want to review the list to determine the tasks that are appropriate for your event. If a task is applicable, you will want to review the description for that task which can be found on pages 3-7...

- **title and theme**
- **location**
- **curriculum**
- **budget**
- **sponsorships/scholarships**
- **program and other publications**
- **workshop presenter**
- **keynote speakers**
- **transportation**
- **accommodations**
- **audio-visual equipment**
- **food and refreshments**
- **registration**
- **evaluation**
- **entertainment/hospitality**
- **other**

Checkpoint:

- We have not created a task list. STOP and create a list
- We have a task list! CONTINUE to the most important part of the meeting....

>>>> delegate responsibility for each task <<<<

Possible Tasks and Their Descriptions

(listed alphabetically)

Bags and other workshop carry-alls

Bags have the advantage of both providing workshop participants with a memento that will act as an ongoing advertisement for future workshops and as a bag to keep all the workshop materials together. The cost of the bags may be covered by one or more sponsors, in return for publicity, such as logos that can be printed on the bag. Other forms of workshop carry-alls include folders, sample bags, and publications that contain material relevant to the workshop.

Budget

In cases where an annual event is being planned, a budget from a previous year can be a help when planning funds needed for a workshop. The basic budget includes:

An income side -- all sources from which revenue may come - workshop registration fees, sponsorships (donations and cash).

And an expenses side -- all possible expenses including...

- the site, what it includes, what you may need to add
- committee expenses
- food, snacks, and catering services needed for the workshop
- amount of any scholarships to be offered
- costs associated with the workshop presenter – honorarium plus travel (CSM guidelines are \$5 for each participant per day to a maximum \$100 per day)
- costs expected for special guests, entertainment, or keynote presentations
- expenses for audiovisual or other equipment not supplied by workshop site
- gratuities or purchased gifts for host site or special guests
- expenses associated with publications and promotional materials – including their distribution and mailing

Catering and Refreshments

Some workshop sites allow outside catering; others do not. This may influence your choice of sites. If you are happy to use the workshop site's caterers then you may simply need to choose a menu, provide the caterers with the numbers that will be attending your workshop, and the times you want to schedule morning, afternoon and lunch breaks. Choosing a site that can offer you many different services will probably cost you a little bit more than if you organize these things yourself; on the other hand, it may not be worth the extra time and effort. Be sure to clarify when the breaks will be and what will be served.

Curriculum

Choose workshop materials to be used. A wide variety of curriculum materials are available through the General Board of Discipleship. Generally, these courses are created for use with Lay Speaking Ministries, and are approved resources for *Christ Servant Ministries* workshops. However, you may want the curriculum to be created by the presenter or selected from some other resource. If this is the case, be sure to follow policies listed in the CSM Policies and Procedures Manual approved by EPA Conference Board of Lay Ministries. Curriculum selection will influence the length (1/2 day, full day, overnight, multiple days, evenings) of the workshop, as well as CSM Workshop Credit (credits are usually 1 credit for each hour of class time).

Evaluations

Evaluations are important to gauge the success of each session and the overall success of the workshop. This can be done with a survey form that can quickly be filled out at the end of each workshop session, or at the end of the entire workshop. Check with the conference director to see if a standard evaluation form is available. Comments and information from evaluations is helpful for persons responsible for the planning future workshops or trainings and the workshop presenters.

Hospitality, Entertainment, and Social Activities

Hospitality is an important aspect of a workshop, as it can give participants a positive feeling about your workshop. Special care should be given to the time when the workshop participants begin to arrive. (Are there signs directing them to the registration desk? Will refreshments be available... coffee, water, tea? Is there someone to greet them and answer their many questions? Don't forget you have been living this workshop... but your participants are just coming!) Consider entertainment or social times that can provide a valuable opportunity for networking. These can include informal activities, such as a luncheon, barbecue or sharing tables used at break times; or more a formal event, such as a workshop dinner and/or a breakfast with a guest speaker.

Keynote Speakers

A widely known and respected keynote speaker can greatly enhance the attendance at your workshop; but this aspect of the workshop may also come with a significant cost. If you decide to have a keynote presenter, be sure you are aware of the presenters' requirements well in advance of their presentation so that you can provide the extra equipment or space that they may require.

Location

Contact all sites identified in your planning meeting to determine if they can accommodate the needs that were identified at the meeting. Things to consider when choosing a site:

- costs for use of the site and what is included in the price. (Some places are known to charge for everything, including water.)
- size of the workshop and suitability of the space at the potential site
- geographical location in relation to that of the expected workshop participants
- availability of parking
- availability of overnight accommodation for participants
- access for people with disabilities
- food, refreshments for breaks, and catering services
- facilities the site can provide, such as audio visual equipment, lecture rooms, areas for exhibits, catering, phone lines for telephones, computers, internet
- equipment you need and whether you or the site will need to provide it
- experts you may need to handle requirements for lighting, audio, or visuals and whether the workshop center will provide them
- timing and responsibility for setting up and dismantling displays
- time allowed by the site to set up and pack up before and after the workshop
- business hours and contact information for the site
- environmental considerations, such as use of polystyrene cups.

Be prepared to present a list of pros and cons for each site to the workshop planning committee as soon as possible so a site can be selected.

Program and/or Agenda

A program outlining the general timetable for the workshop is always helpful for the workshop participants. This timetable should take into consideration the availability, and suitability for your activities, of different facilities at the workshop site. Be sure to include time for registration and opening remarks. Most presenters don't like to be interrupted for announcements or details that should be covered before or after their presentation. Depending on the number of participants, it may be useful to have timeslots that vary in length or the flexibility to allow for double sessions.

Meal breaks and other events, such as remarks from a keynote speaker or special guest, should be in the program. Keynote speakers' presentations are often held at the beginning of the workshop day to act as a focus for the day's activities. Be sure to include time for participants to browse through any displays you may have planned (this may be allowed for during the time allocated for meal breaks).

Publicity and Advertising

The person in charge of publicizing the workshop has a big task. This individual or team is responsible for arranging advertising, coordinating publicity releases with the mailing of registration, and providing the media with information (via media releases). Advertising may include mailings to individuals and other organizations. Don't forget to let your conference CSM Director know as soon as you have a location and date set and a contact person for the workshop. The Conference Director can assist in posting your workshop on the CSM website. It may be possible to have your registration done online. A due date and refund policy should be included in all promotional material. Be sure that this information allows enough time for workshop organizers to complete the program. Consider issuing a press release to local media sources close to the workshop date.

Registration

All publications and registration forms should include the contact details of the person responsible for registration, so that workshop participants can correspond directly with this person. Copies of the workshop program should be sent out to allow participants to schedule different sessions and workshops. This should be done as early as possible (send a draft if the program is not finalized). This can also generate more interest in your workshop.

Create a database of registrations. Use the database to generate nametags for participants and to ensure that all participants receive the appropriate materials. At the workshop, be sure there is a registration table with a list of workshop participants and the relevant nametags and handouts. Prepare sufficient materials for extra people who may register or be present the day of the workshop and need workshop materials (i.e. bags, nametags, programs).

Title and Theme

The selection of a title and theme may reflect a new direction... if this is the case you will want to be sure that someone is working on this task. How about a logo or picture to symbolize and focus attention on the theme of your workshop? This logo can then be included in all publications and publicity material to help people quickly identify and associate with your workshop.

Transportation and Accommodations

Consideration should be given to the responsibility for organizing any needed transportation and/or lodging. Things to consider include:

- if overnight accommodations are needed, is there a range of lodging, from cheap to expensive?
- will there be speakers or out-of-state guests that need transportation or overnight accommodations?
- are food and other facilities readily available to the workshop site?
- is public transportation to the workshop site available?
- is there a contact person if someone needs a ride?

Workshop Administration

A number of different administrative tasks will need to be performed during the course of the workshop. These may include:

- movement of participants to and from different workshops, presentations or meetings
- provision of adequate equipment to presenters
- provision of up to date information to participants, particularly regarding any changes to the workshop program
- liaison with workshop site staff to keep things running smoothly.

It is a good idea to ensure that someone is available at all times in a central location, such as at the registration desk, to coordinate activities and attend to any problems that may arise.



Workshop presenter

This task is vital to the success of the workshop. Definite arrangements with the presenter of the workshop should be made very early in the process. Be sure to maintain personal contact with them up to the day of the workshop. Contacts can be made via e-mail, phone, and snail mail. It is also a good idea to consider what you will do if a presenter must cancel at the last minute.

Last Minute Details

1. Have a list and box for the miscellaneous items you will want to bring. Be sure to include Pens, Pads, Equipment, Documents, Presentation notes, Badges, AV equipment, Business Cards, Name Badges, Printed Handouts of Material that will be covered, etc.
2. Make sure you have arranged for a place for the labels and name badges. They can be pinned or clipped onto a board, arranged in packets, or placed on a table. Be sure you alphabetically organize them by name or workshop. It is always important have spare badges for additional attendees or visitors.
3. Publicity materials: Prepare brochures, flyers, banners and general info to display.
4. Display equipment: Prepare or plan for display boards, tables, chairs for publicity materials, and name badges.
5. A/V Equipment: Check A/V Equipment (laptop, projector etc to ensure all cables, leads, laptop accessories, screen, microphone, are working and available). If possible, have a source for last minute back-up equipment.
6. Communicate the following to all attendees, planners, and workers ...
 - Workshop location, telephone number, and directions
 - Date & timing
 - Dress code
 - Main point of contact for general information
 - Itinerary for the day(s)
 - Expectations for attendees
 - How they will be met
7. Get to the site preferably an hour before the attendees and check the following...
 - Signage
 - Registration and Name Badge Area
 - Workshop Location(s)
 - Room Number(s)
 - Bathroom and telephone locations
 - Number of chairs and the room arrangement
 - Flipchart and markers, A/V Equipment, Notepads and pens
 - Availability of water
 - Refreshment area, snacks, plates, serving utensils, napkins
 - Location of any meals and timing of food delivery and/or serving
8. Have Fun! Relax.

With all of your good planning everything will hopefully work out fine!